VistA Scheduling Enhancements (VSE 1.3)

*Veteran Focused Integration Process (VIP)*

*Epic 25 Auto-Populate CID from RTC*

*User Story Document*



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# Purpose

The VIP Epic User Story Document is authored by the business community for the purpose of capturing and describing the business needs of the customer. This document identifies what capabilities the stakeholders and the target users need and provides a focused overview of the request requirements.

# Assumptions, Notes and General Requirements

1. The return to clinic (RTC) communication between provider and scheduler will continue to be through CPRS Orders.

Note: There is no direct link to the Orders file.

1. At any time an RTC appt request is dispositioned, a notification is sent to CPRS and the CPRS order will be discontinued with the disposition type. CPRS will then handle the notification and alert the provider, if necessary.
2. At any time an RTC appt request is dispositioned accidentally, a notification is sent to CPRS with the disposition type. CPRS will then handle the notification and alert the provider, if necessary.
3. If an RTC Order is canceled by the Provider, CPRS will notify VSE; VSE will handle this disposition automatically and cancels the Appointment Request on VS GUI with the disposition reason ‘Removed/No longer necessary’.
4. If any action is taken in VSE on the “Appointment” (RTC) Request the Order in CPRS will be marked as completed or discontinued as appropriate according to business rules.
5. If the appointment is scheduled or moved to PtCSch, EWL, etc., then the order in CPRS is completed; there will be the capability to transfer the RTC/APPT REQUEST to PtCSch.
6. VSE only communicates with CPRS when the RTC/APPT REQUEST is dispositioned.

# Epic User Stories

## Epic 25 – Auto-populate CID from RTC (*Rational ID RM 899126, RTC 494688*)

### Sub-Epic 25.1 (*Rational ID*) – Display ‘Open’ requests and auto-populate data

**End User:** VS GUI Schedulers and supervisors (of schedulers)

**End User Attributes/Circumstance**: Schedulers/supervisors view/audit/validate patient appointment information

**Purpose:** Schedulers and supervisors view/audit/validate Clinically Indicated Date (CID) imported from RTC (Return To Clinic) order

**Problem to be solved:** The current VistA Scheduling (VS) GUI system requires manual update of CID and related fields that is causing errors and delays in scheduling the appointments.

**Business Process Improvement Goal:** The GUI must auto-populate CID and other fields from RTC orders in CPRS.

| User Story | Features | Non-Functional Requirement | Business Rules | Acceptance Criteria |
| --- | --- | --- | --- | --- |
| (*RationalID RM 899128, RTC 522255*)  US 25.1.1  As a VS GUI scheduler, I can view order information auto-populated from an RTC order displayed as APPT/RTC request. | (*RationalID 899130*)   1. **FEAT25.1.1-1 Requested By** (ordering clinic location), **Requestor** (ordering provider), **Entered Date, CID,** and **Clinic/Service** (clinic location to be scheduled) from VistA are automatically imported and auto-populated in VS GUI as APPT/RTC Request.   (*RationalID 899131*)   1. **FEAT25.1.1-2** The information from the order will populate in the appt request, to include the comments. | (*RationalID 899136*)  NFR 25.1.1-1 Must be 508 -Compliant | (*RationalID 899138*)   1. **BR25.1.1-1** VS GUI will display only ‘Open’ requests.     Note: When an order is opened in CPRS, a new Appt Request will be created and displayed on RM Grid. If an order is cancelled, the appt request will be dispositioned as “Removed/No longer needed”. This will affect display of the request on the RM Grid, rather than the order’s status directly.  (*RationalID 899139*)   1. **BR25.1.1-2** Requested By (ordering clinic location), Requestor (ordering provider), Entered Date, CID, and Clinic/Service (clinic location to be scheduled) from VistA must be imported and auto-populated in VS GUI. | (*RationalID 899128*)  **AC25.1.1-1** Resource Management (RM) Grid on the VS GUI displayed ‘Open’ RTC order as APPT/RTC and auto-populated with the following fields: Requested By, Entered Date, CID, Clinic, Order Details. |
| (*RationalID RM 899129, RTC 522261*)  US 25.1.2  As a VS GUI Scheduler, I can see ‘No Later Than’ date from CPRS RTC in the Comments field of the Appointment Request and in the Notes field of the New Appointment as ‘#NLT#. | (*RationalID 899132*)  FEAT25.1.2-1 ‘No Later Than’ date from CPRS RTC is auto-populated as #NLT# in the Comments field of the Appointment Request and in the Notes field of the New Appointment. | (*RationalID 899137*)  NFR 25.1.2-1 Must be 508 compliant | (*RationalID 899140*)  BR25.1.2-1 No later than information from CPRS Order Details is displayed to the scheduler on the New Appointment Notes and Appointment Requests Comments fields.  Note: Screenshots are included in the Appendix. | (*RationalID 899129*)  AC25.1.2-1 No later than date is displayed as #NLT# in:   1. Notes on New Appointment 2. Comment on Appointment Request. |

### Sub-Epic 25.2 (*Rational ID*) – Service Connected

**End User:** VS GUI Schedulers and supervisors (of schedulers)

**End User Attributes/Circumstance**: Scheduler/supervisor is creating an appointment

**Purpose:** Schedulers and supervisors view/audit/validate service connected information and, if needed, update data

**Problem to be solved:** Currently providers are not entering whether or not an appointment is for a service connected condition when entering an RTC order in CPRS.

**Business Process Improvement Goal:** The GUI must default to service connected appointment type or Clinic depending on the service connected disabilities following business rules.

| User Story | Features | Non-Functional Requirement | Business Rules | Acceptance Criteria |
| --- | --- | --- | --- | --- |
| (*RationalID RM 899129, RTC 522261*)  US 25.2.2  As a VS GUI Scheduler, I can see that the Service Connected is set to default following business rules. | (*RationalID 899132*)   1. If SC is greater than 50%, then the service connected is selected. 2. If the SC is less than 50%, then the service connected is not selected. | (*RationalID 899137*)  Must be 508 compliant | (*RationalID 899140*)   1. Current business rules for appointment request & appointment scheduling need to apply for service connected disabilities as well. 2. SC greater than 50% = SC appointment type will default but the SC block & appointment type is editable. 3. SC less than 50% = clinic default for appointment type but the SC block and appointment type is editable. | (*RationalID 899129*)  VS GUI Scheduler can see that the ‘Svc Related’ radio button on the Appointment Request is checked or unchecked based on the business rules. |
| (*RationalID RM 899129, RTC 522261*)  US 25.2.3  As a VS GUI Scheduler, I can update service connected and appointment type data. | (*RationalID 899132*)  SC block & appointment type is editable. | (*RationalID 899137*)  Must be 508 compliant | (*RationalID 899140*)   1. SC greater than 50% = SC appointment type will default but the SC block & appointment type is editable. 2. SC less than 50% = clinic default for appointment type but the SC block and appointment type is editable. | (*RationalID 899129*)  VS GUI Scheduler can change ‘Svc Related’ and ‘Appointment Type’ fields even if they contain default information. |

### Sub-Epic 25.3 (Rational ID) – View Pre-requisite Information

**End User:** VS GUI Schedulers and Supervisors (of Schedulers)

**End User Attributes/Circumstance**: Schedulers/Supervisors view/audit/validate patient appointment information

**Purpose:** Schedulers and Supervisors view pre-requisites before scheduling the appointments.

**Problem to be solved:** The current VS GUI system does not include pre-requisites for viewing.

**Business Process Improvement Goal:** VHA Directive 1230 - Continuous auditing and improvement process of scheduling activities such as the timeliness and appropriateness of scheduling actions, accuracy of CID or PD dates and telephone call quality

**Assumption:** Functionality and information currently available in the VS GUI is not to be replaced by any new additions implemented per this user story and associated requirement.

VHA Business Rules:

| User Story | Features | Non-Functional Requirement | Business Rules | Acceptance Criteria |
| --- | --- | --- | --- | --- |
| US 25.3.1  As a VS GUI scheduler, I can view the pre-requisites. | **FEAT 25.3.1**  Pre-requisites from CPRS are displayed to the scheduler on the VS GUI as view-only, non-editable information for a scheduled appointment. | NFR 25.3.1-1  Must be 508 compliant  NFR 25.3.1-2  A red flag on the record can be an indication of the availability of either comments or pre-requisites. | BR 25.3.1  Pre-requisites are displayed as view-only/non-editable data. | **AC 25.3.1-1**  The record is highlighted with a red flag indicating the availability of pre-requisites.  **AC 25.3.1-2**  Upon selection of the record, pre-requisite information is displayed as view-only non-editable data on the VS GUI pop up window. |
| US 25.3.2  As a VS GUI scheduler, I can view the pre-requisite information while working on the patient record. | **FEAT 25.3.2**  Pre-requisite information is displayed until the window is closed or a new patient request is selected. | NFR 25.3.2  Must be 508 compliant | BR 25.3.2  Scheduler should be able to work on the record while the pre-requisites window is open. | **AC 25.3.2-1**  Pre-requisite information is displayed until either a) the window is closed or b) a new patient request is selected.  **AC 25.3.2-2**  Scheduler is able to work on the record while the pre-requisites window is open. |

# Appendix A – Future Requirements

## Display Order Details as a pop-up window.

1. The Order Details from CPRS are available to the scheduler in a new “View Order Details” menu selection and pop up window. This will allow all information from the order in CPRS to be displayed to the scheduler to include additional fields used in the order set up for that location. Whatever a user sees when they double click on the order in CPRS should be shown in this Order Details window.
2. Scheduler is able to move between Order Details pop-up screen and the transfer to Recall/PtCSch disposition screen or make an appointment screen.
3. The Order Details pop up window does not close until the scheduler actively closes it.

## Highlight New Appointment Request

1. New appointment requests are flagged or otherwise highlighted on the RM Grid until viewed by the scheduler.

## Search Tool

1. Ability to use the query tool to search for and produce a work list of open RTC APPT Requests.
2. The query tool will allow VS GUI users to search for and act on a list of RTC Appt Requests, just like they can with Veteran or normal Appointment Requests
3. Search rules would remain the same; RTC Appt Request is added as an option on the filter.
4. Schedulers should be able to act on the request list produced from the query tool as if they were in each individual chart (make appt, discontinue/cancel, or transfer Recall/PtCSch).

## Label change

1. Label change from CID/Preferred Date to Pt Indicated Date (PID).

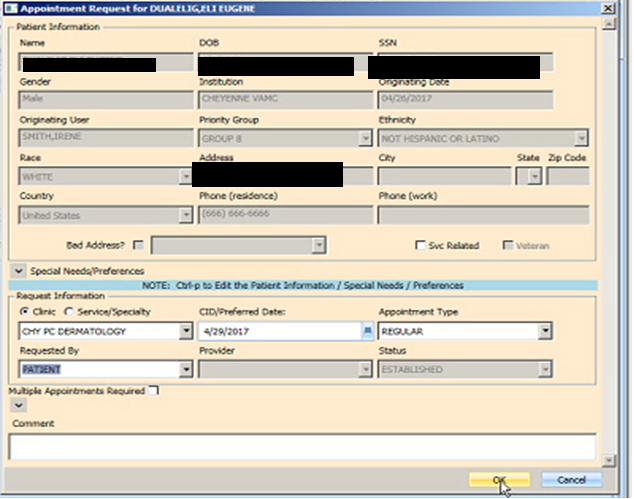
## Transfer to Recall/PtCSch

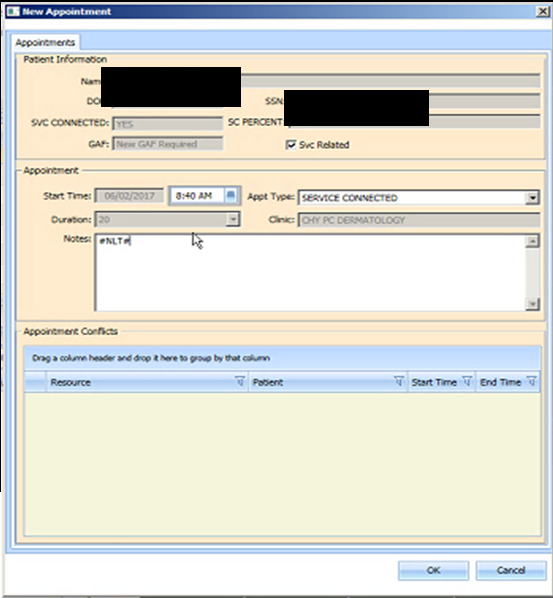
1. A disposition option will be available to "Transfer to Recall/PtCSch”, similar to the existing “Transfer to EWL” disposition option.

# Appendix B – Screenshots

The following screenshots provide visual to help clarify the requirement definitions.

**“#NLT#”**

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# Appendix C – Disposition Details

RTC information

409.85,21     DISPOSITION            DIS;3 SET

|  |  |
| --- | --- |
| **APPT Request  Dispositions** | **RTC Order Disposition** |
| 'D' FOR DEATH | Discontinued – alert to Provider |
| 'NC' FOR REMOVED/NON-VA CARE | Discontinued – alert to Provider |
| 'SA' FOR REMOVED/SCHEDULED-ASSIGNED | Completed |
| 'CC' FOR REMOVED/VA CONTRACT CARE | Discontinued – alert to Provider |
| 'NN' FOR REMOVED/NO LONGER NECESSARY | Discontinued – alert to Provider |
| 'ER' FOR ENTERED IN ERROR | Discontinued – alert to Provider |
| 'TR' FOR TRANSFERRED TO EWL | Completed |
| Moved to Recall | Completed |